Training Transcript for Module 1
Site Information

This is Module 1 – Site Information of the DOE's EMI SIG Exercise Builder Online Training. In this module you will learn how to navigate and add data into the Site Information section of Exercise Builder. At the end of the module, you will do a practice activity for entering onsite and offsite emergency response organization (ERO) data for a fictitious Energy Research Center site.

From the Exercise Builder home screen, click the right arrow in the lower corner of the center panel of the screen to go to the first step under the Site Information section.

Exercise Builder requires information about the sites' or facilities' EROs be entered to begin the development of an exercise plan.

Under the Site Info section, all potential exercise participants are loaded, including site, county, city, tribal, state, federal, and other EROs that may at some time play a part in an exercise.

Click the Next Arrow to go to Step SI.2 Site/Facility Emergency Response Organizations (EROs).

You can move between screens in the Site Info and all steps by using the right and left arrows.

The Site/Facility Emergency Response Organization box in the center panel, when completed, identifies the top tier of the ERO.

As this data is managed, you can move entries up and down, add, edit, or delete organizations. Notice that only the Add button is blue. The other buttons are greyed out which indicates they are not active. Once you add the first ERO, the Edit and Delete buttons turn blue. When you have two or more organizations, the up/down buttons activate.

Click Add to display the Site/Facility ERO Worksheet.

The Site Information (or Site Info) step uses a series of worksheets to collect the required information.

When you select Add, a Site/Facility Emergency Response Organization (ERO) Worksheet opens.

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Think about the site, facilities, and individual organizations who would respond to an event (for example, the Fire Department, Security, or Continuity Response Group.)

Enter the name of the Site or Facility in the worksheet. For purposes of this lesson, we will use Energy Research Center.

Enter an abbreviation to use for the site. This is tied to the Exercise objective nomenclature. In this case, we will enter ERC.

Note that ERC has a red underline which typically means that the word is misspelled or not in the dictionary.

The spell check function in Exercise Builder is basically the same as spell check in Microsoft Word. Any misspelled or "unknown" words are underlined in red . Using your mouse, right click the underlined word, and you are provided with spelling recommendations. You may choose one of the recommended spellings, or if the spelling is correct, you can add it to your custom dictionary.

It's important to note that the custom dictionary resides ONLY on the computer where the file was developed. If you transfer the exercise file to another computer or place it on the local area network for someone else to use, the custom dictionary does NOT accompany the *Exercise Builder* file.

The Energy Research Center has a fire department, security, EOC, and other response organizations.

To add these, click Add.

Once a site or facility name and abbreviation are entered, the fields are pre-populated with the site or facility information in the worksheet. This feature intentionally ties the responder to the specific site or facility.

Following the words "Energy Research Center" in the name box, add the responder name (i.e., Fire Department) and enter an abbreviation after ERC such as FD.

You may add contact information for the responder such as the name with telephone number, cell phone number, email, and pager number. This information is used in Step 3 Planning which we'll discuss in Module 3.

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If you are satisfied with your entries, click OK; if not, click cancel.

You now see that the Energy Research Center Fire Department and Duty Officer have been added to the list of responders within the ERC.

Notice that you can edit or delete Site or Facility Emergency Responders by using the blue Edit and Delete buttons..

When two or more responders are added, the Down and Up buttons become active.

When you finish adding your Site or Facility emergency responders, click the Save button before closing the worksheet. If you forget to save and use the Close button instead, the system will display: “Do you want to save changes to the worksheet?”

- If you select Yes, enter the name of the file and save it to your Exercise Builder folders on your computer.
- If you select No, the system will not save your input.
- If you select Cancel, the system will return to the Site/Facility ERO Worksheet.

Select “Save” and name the file “Energy Research Center Exercise.”

By default, plan documents as well as reports, error logs, and template files are saved in the "...Documents/EMI SIG/Exercise Builder" folder.

Notice on the Site Info steps outline, sections are included for offsite EROs. Input the ERO data for each of these jurisdictions the same way you entered data for the Site/Facility.

Click SI.7 Federal Emergency Response Organizations in the Process Outline.

In Site Information, SI.7, Federal Emergency Response Organizations are pre-loaded for the U.S. Department of Energy (DOE).

If you click the Edit button or the highlighted U.S. Department of Energy (DOE), the Federal ERO Worksheet opens. The DOE HQ Emergency Management Team and DOE Watch Office have been pre-loaded for the DOE ERO.

If your site hosts a Radiological Assistance Program or other radiological response asset teams, you may want to add them by using the Add button.

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- The Edit button can be used to modify information.
- The Delete button will remove the highlighted responders.

After you add or modify information, remember to click the Save button before closing the screen and returning to the Federal Emergency Response Organizations (EROs) Worksheet.

When you return to the Federal Emergency Response Organizations (EROs) Worksheet, you can add additional federal EROs such as the Federal Emergency Management Agency (FEMA), the Federal Bureau of Investigation (FBI), or any other federal agencies that participate in your site's exercises.

Exercise Builder has a Worksheet for Other Emergency Response Organizations. For example, you can add your local utility board/power provider to this Worksheet. These organizations may have power restoration response teams, a command center, or other assets you may use or interact with during an extended event.

The American Red Cross is another organization you may want to add in this section, especially if they support the offsite response across jurisdictions.

Exercise Builder also has a step to record your mutual aid agreements.

- Click the SI.9 to open the Mutual Aid screen.
- Click the Add button to open the Add New Mutual Aid worksheet.
- Enter the Mutual Aid Title.
- Enter a summary of services that are exchanged.
- Use the drop-down arrow to select the Mutual Aid Type.
- Click the OK button to save entries and close the window. The Cancel button closes the window without applying the entries.

You can continue to add, edit, or delete any mutual aid agreement that is highlighted. When more than one mutual aid agreement is entered, the Down and Up buttons activate.

After entering all of the mutual aid agreements, click the Right Arrow button to go to the next step.

This screen displays a Generate & Save Document: Site Information link.

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When you click this link, you are prompted to save the Site Information document in your Exercise Builder folder area. Once the file is saved, a No Exercise Title pop-up window prompts you to enter an exercise title You cannot generate exercise/baseline documents, reports, or worksheet prints without an exercise title. Place your cursor in the field and enter the exercise title. For demonstration purposes, let's enter Fiscal Year Mutual Aid Test. Clicking Cancel closes the pop-up window and returns to Step SI.10 without an exercise title. So click the Ok button to proceed and save the exercise title. To modify the title, you will need to go to the Purpose section step 1.2. For now, let's keep this title. The site information data is generated and formatted based on a default template.

The default template displays the file name of Site Info.docx. Select the Save button to save the document.

In this case, the template is SITE_INFO_Temp.

You may want to modify the document with functions such as font type, font size, various bold, italicizing, underlining, headers, footers, page numbers and cover page information.

In order to do this, click <u>Edit Current Site Information Template</u>. In this template, make your formatting changes. When you save the template, it asks for a new template name. Select a name and click on the Save button.

To generate the document in the new format, click <u>Select a Different Site Information Template</u>, which displays a list of templates you built for Site Information.

After selection, the Current Site Information Template will show the template you selected.

Now Generate & Save and the document is generated using your modified template.

It's important to note that if you edit the contents of your document in Microsoft Word and Save, it will not save in Exercise Builder. You must open Exercise Builder to change the data in the program.

This is part of a pre-loaded Exercise Builder template. Using Microsoft Word, you can enter a header and footer, page numbers, change the font type and size and a number of other formatting characteristics.

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Templates have limitations, so the Exercise Builder templates will not complete all of your formatting. For example, some sites may want the title of plans and procedures in Italics; however, since the plan or procedure name is not a separate and distinct data item, Exercise Builder format cannot be applied.

Manipulating template information will be covered later.

The EMI SIG Exercise and Drill Subcommittee Exercise Builder Task Group members may also be used as resources for tips on manipulating templates, best practices, and lessons learned.

When your changes are completed, Exercise Builder saves your work as it is entered. You are asked whether you want to save entries as you add, edit, or delete them.

You should save your work periodically by selecting *Save* under the File drop- down list.

To Save As, you are asked for a file name. As you re-name the file can be saved anywhere within your filing system, whether it is on your machine or your local area network. This function works just like the "Save As" function in Microsoft Office.

If you should have a "crash" or "Error Message," Exercise Builder automatically generates a file that documents the issue.

Error logs are used by the Exercise Builder development team to identify the cause of the error.

Exercise Builder data may be used by multiple users at a site. Since exercises can contain emergency management, protective force, and/or continuity of operations information, a process should be developed at the site level to ensure the site information is current. Data entered into the Site Information Step and other site exercise data to be entered such as participant objectives, response steps and Exercise Evaluation data is known as baseline data in Exercise Builder. It is recommended that only one person be responsible for Baseline data entry.

As a best practice, other users should provide periodic updates to the single point of entry person as participants change, plans or procedures change, and exercise objectives and exercise evaluations guides change.

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The point of entry person should update the Baseline data and then send it to the users to ensure they are using the most current data when developing an exercise.

Exercise Builder saves data differently based on where it is loaded. The Site Information data can only be added in the Site Info section.

Exercise Objectives and Exercise Evaluation Guides (EEGs) may be loaded in two locations within Exercise Builder.

IF the information (objectives and EEGs) are to be used for ANY exercise, it should be loaded in the baseline, then select either the Baseline Objective Worksheet or the Baseline Evaluation Guide Worksheet from the drop-down menu.

IF the information is to be used ONLY for the specific exercise that is being developed, it should be entered through the Objectives section and Evaluation section for EEGs. Once the section is accessed, data is entered via the Objectives or EEG worksheets.

The worksheets, whether for baseline or a specific exercise, work the same way, but store information differently.

When an objective is added in Step 4.2 of the Objectives section, it becomes part of the baseline, but the subordinate response steps or changes to response steps will NOT.

Likewise, when evaluator questions for EEGs are added in Step 8.2 of the Evaluation section, they WILL NOT become part of the baseline. They only apply to the current exercise.

In this module we:

- Explored how to navigate through the Exercise Builder Site Information section steps.
- Added, modified, and/or deleted ERO data in Exercise Builder worksheets.
- Generated and saved Exercise Builder data files for Site Information.
- Addressed default and different site templates and how to edit templates.
- Opened the Baseline Objective Worksheet to enter objectives and response steps for each responder.
- And opened the Baseline Evaluation Guide Worksheet to build the exercise evaluation guides for the objectives.

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This concludes the video portion of Module 1 – Site Information for the Exercise Builder Online Training.

You are now ready to begin the practical application of the Exercise Builder Online Training.

For this activity, you will practice opening and entering data in the Site Information section of Exercise Builder.

You will use the Microsoft Word document titled, *EB Online Training Activity – Module 1 Sites or Facilities.doc* located in the Exercise Builder Online Training Activities Folder.

You may print the EB Online Training Activity information sheet and enter the site info into Exercise Builder as outlined in the document. Using copy and paste to enter the site info from the activity document into Exercise Builder is recommended.

When you have completed entering the site info steps, go to the video portion of Module 2 – Purpose and Scope.